

# **Substance Abuse and Crime Prevention Act SACPA Reporting Information System**

## **User Manual**

Updated: August 28, 2003

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#### **Part Two: Lead Agency** Information

**Inputting Lead Agency** Information

This Section of the manual discusses Lead Agency Information. It explains how to add, verify, and update Lead Agency and County Contact Information.

Verifying Lead Agency Information

The name and address of the Lead Agency will automatically be displayed in the County Information section. Counties cannot update this information. Only ADP has the authority to update Lead Agency information. If the information displayed is incorrect, please contact your ADP analyst.

### **Updating** Information

You may review and update the Contact Information by editing existing information. To **Existing Contact** edit existing information follow these steps:

#### Note:

The contact information corresponds to the person designated as the contact for the Lead Agency. The Contact Information includes, Name, Title, Phone Number, FAX Number, Email Address, as well as Lead Agency Roles and Financial Status Report Approver Level.

- 1. Log on to the SRIS.
- 2. Click on the County Information link in the left hand navigation bar. The County Information page will be displayed. See figure 2.1.

Figure 2.1: County Information Page.



- 3. Click the radio button next to the name of the contact person you wish to review.
- 4. Click on the **UPDATE CONTACT** button located at the bottom of the County Information page. Figure 2.2 is the **UPDATE CONTACT** button.

Figure 2.2: Update Contact Button.



5. Update the necessary contact information on the View/Update Contact Information page and click the **SUBMIT** button to save the new data. Figure 2.3 displays the View/Update Contact Information page.

Figure 2.3: View/Update Contact Information Page.

meda County	Health Care Services Agency/Behavioral Health Care	Ser
w/Update Contact Information		
update Contact Information for t	nis Lead Agency, enter the contact information and click the Submit button.	
Contact Information		
Name: (First & Last Name)	John Doe	
Job Title:		
Phone:	800 - 555 - 5555 <b>Ext:</b>	
Fax:		
Pager:		
Mobile Phone:		
Email Address:	tbox@adp.state.ca.us	
Email Address.	tbox@adp.state.ca.us	
Lead Agency Roles:	✓ Lead Agency Contact	
	✓ Plan Contact □ Financial Status Report Contact	
	_ Financial Status (Neport Contact	
	Financial Status Report Approver Level 1	
	Effective Date (From - Through): / / - / /	-
	✓ Financial Status Report Approver Level 2	
	Effective Date (From - Through): 01 / 30 / 2003 - / /	-

## Adding a New Contact

County users may also add new contacts from the Update Contact Information.

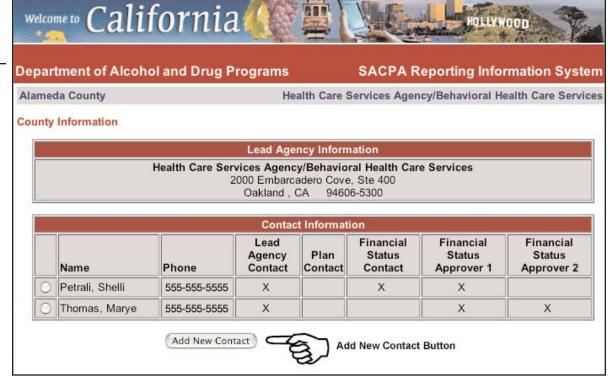
- 1. Log on to the SRIS.
- 2. Click on the <u>County Information</u> link in the left hand navigation bar. The County Information page will be displayed. See figure 2.4.

Figure 2.4: County Information Page.



3. Click **ADD NEW CONTACT** button. The Add Lead Agency Contact page is displayed. Figure 2.5 is the **ADD NEW CONTACT** button.

Figure 2.5: Add New Contact Button.



4. Choose from the **User Name** box, and click the **SUBMIT** button. This will open the Update Contact Information page. Figure 2.6 is the Add Lead Agency Contact page.

Figure 2.6: Add Lead Agency Contact Page.

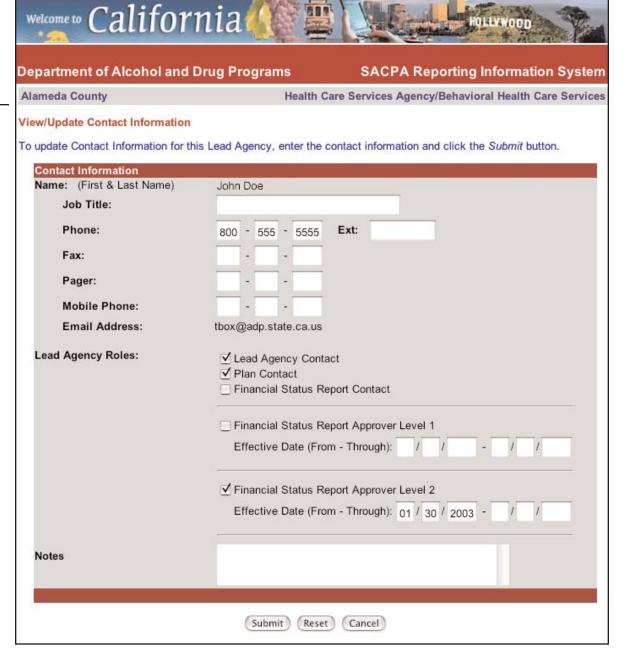


# Entering and Updating Lead Agency Roles

County users can go to the Update Contact Information page to enter or update Contact Information, Lead Agency Roles, and Financial Status Report Approver Level.

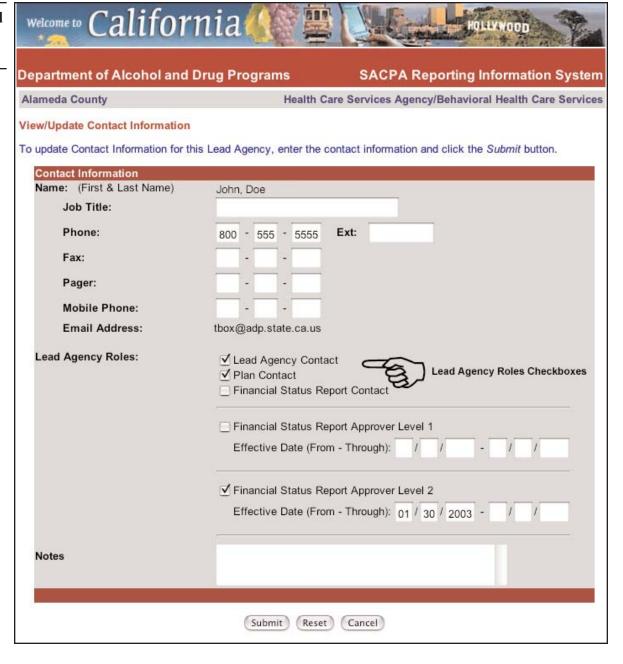
- 1. Log on to the SRIS.
- 2. Click on the County Information link in the left hand navigation bar.
- 3. Click the radio button next to the name of the contact you wish to review.
- 4. Click on the **UPDATE CONTACT** button located at the bottom of the County Information page.
- 5. Update the necessary contact information on the View/Update Contact Information page and click the **SUBMIT** button to save the new data. Figure 2.7 is the View/Update Contact Information page.

Figure 2.7: View/Update Contact Information Page.



6. Check the box(es) that represents the type of information the contact is responsible for. Counties may have more than one contact for each role and contacts can have multiple roles. See Figure 2.8.

Figure 2.8: Lead Agency Roles Checkboxes.



7. For a county contact that is a Financial Status Report Approver Level 1 or Level 2, check the appropriate box and enter an effective-from date. The effective-from date must be later than 5-1-01, and must be before the effective-through date. See figure 2.9

Figure 2.9: Financial Status Report Approver Level Designations.

lameda County	Health Care Services Agency/Behavioral Health Care Services		
ew/Update Contact Information			
update Contact Information for th	is Lead Agency, enter the contact information and click the Submit button.		
Contact Information Name: (First & Last Name) Job Title:	John, Doe		
Phone:	800 - 555 - 5555 <b>Ext</b> :		
Fax: Pager:			
Mobile Phone:			
Email Address:	tbox@adp.state.ca.us		
Lead Agency Roles:	✓ Lead Agency Contact ✓ Plan Contact □ Financial Status Report Contact		
	Financial Status Report Approver Level 1		
Financial Status Report Approver Level Designations	Effective Date (From - Through): / / - / /		
	Effective Date (From - Through): 01 / 30 / 2003 - / /		
Notes			

#### Note:

The approver cannot set the Financial Status Report Approver Level 1 and Level 2 designations. Any other county user with a Username and Password can designate the approver as either Level 1 and/or 2. To end a user's approver rights, enter a throughdate that is on or after the date you wish to end approver's rights.

8. Click the **SUBMIT** button. The Contact Information page is re-displayed with updated contact information.